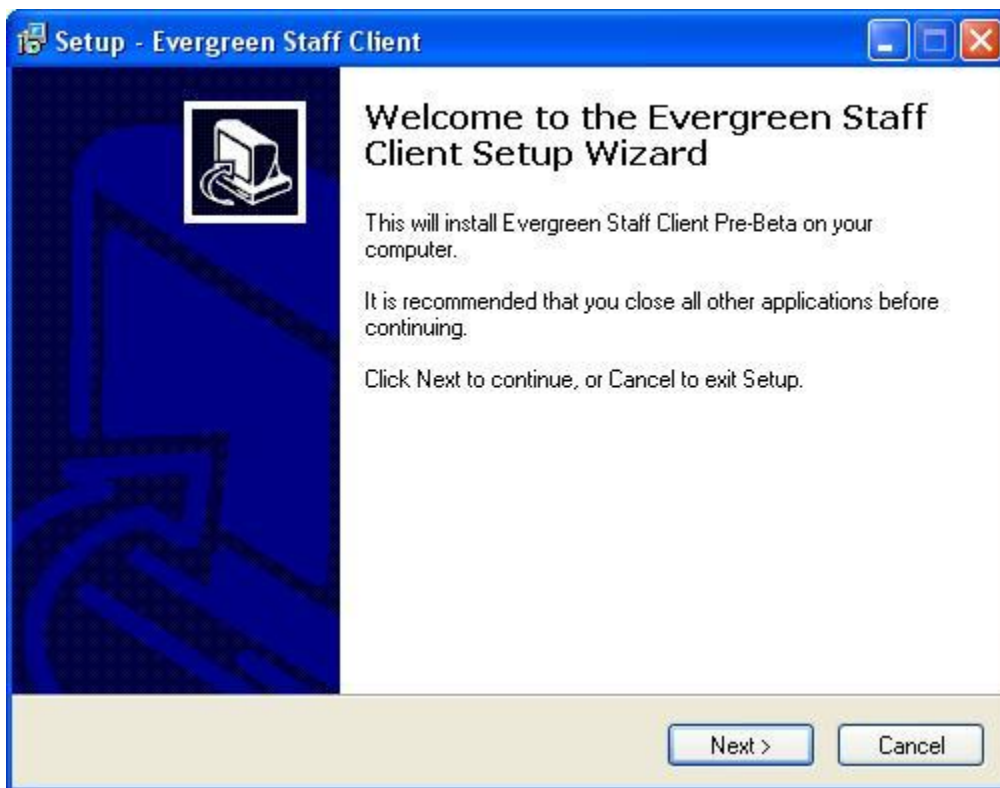




## Installing the Staff Client

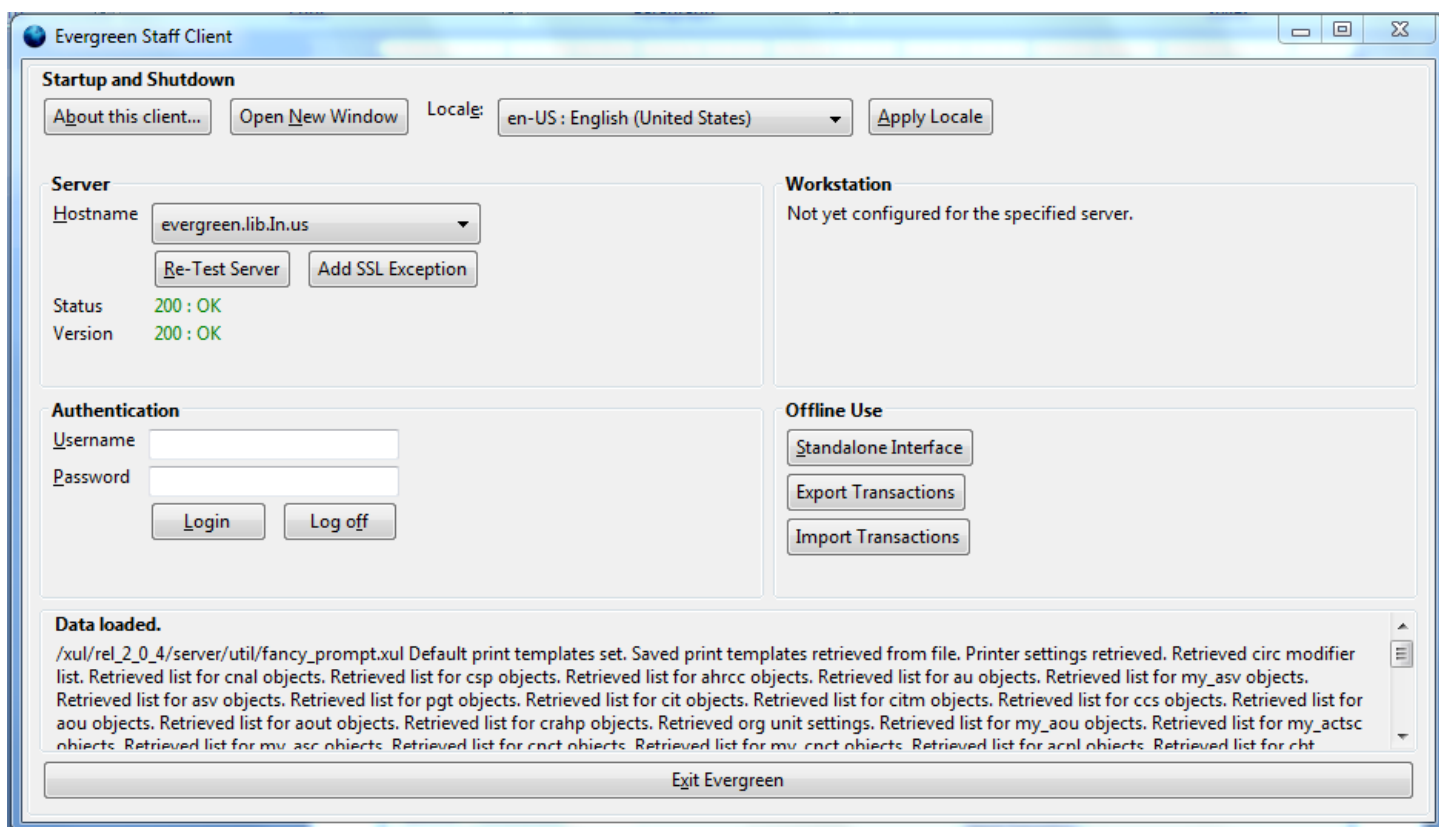
### Installing On Windows

The staff client is available for download from the downloads section on the Open-ILS website at [http://www.open-ils.org/staff\\_clients.php](http://www.open-ils.org/staff_clients.php). You will need to find out from the project manager which version of the staff client to download. As of April 2011, Evergreen Indiana is running on Evergreen 2.0.4. Download the staff client installer, and run it. A screen will appear that looks similar to this:



Click the Next button to continue through the guided install process. The install wizard will ask you to agree to the end-user license, ask you where to install the software, ask about where to place icons, and then will install the software on your workstation.

When you run the staff client for the first time, a screen similar to this will appear:



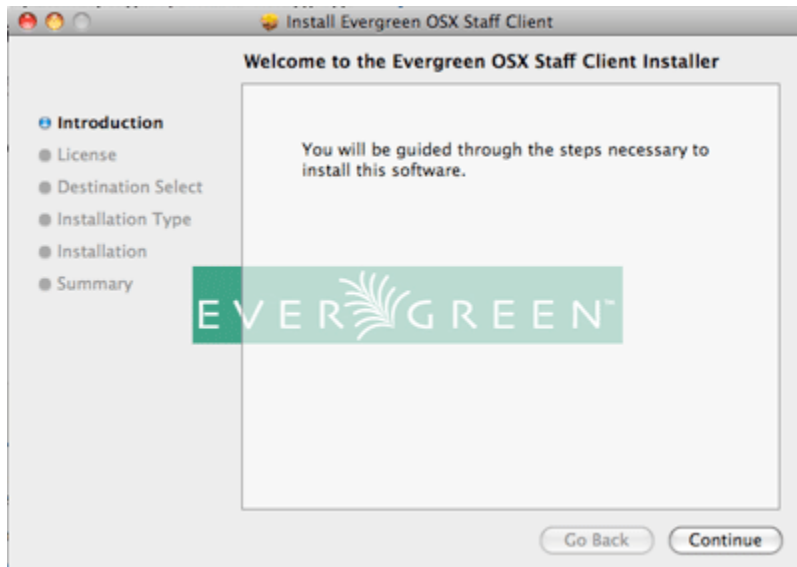
**Server:** First, configure the server you would like to connect to in the **Server** section. To access the live server, you will use the following hostname: **evergreen.lib.in.us**. After selecting a server, click the **Re-Test Server** button or hit the tab key. You may need to get a security certificate. You can do this by clicking on the Add SSL Exception button and choosing Get Certificate.

**Authentication:** The **username** and **password** in the **Authentication** screen will be given to you by the staff at the Indiana State Library. On migration day, you will receive a username and password for circulation, cataloging and local administration activities.

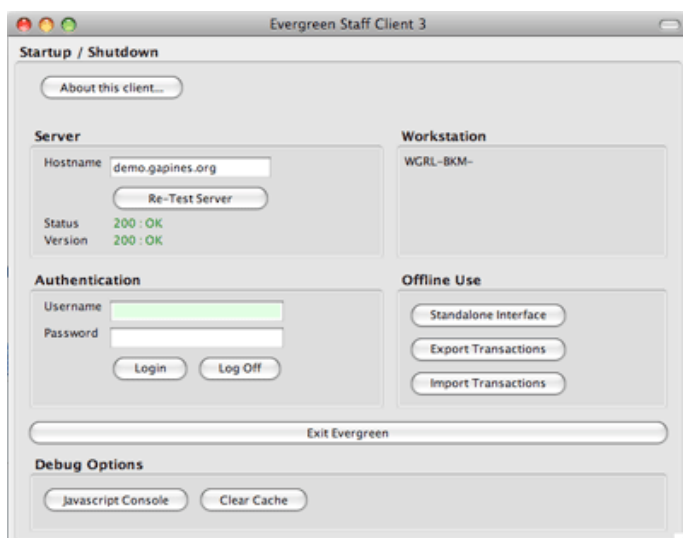
## Installing On Mac

A staff client (Version 1\_2\_3\_0) is available for download from [HERE](#) built using the method described below. Note: the installation package does not automatically install XULRunner, which it requires to run. You will need to install the [1.8.0.4 Version of XULRunner](#) for Mac.

When you run the staff client installer, a screen will appear that looks similar to this:



Click continue, accept the license, then finish the installation. The application will be located at the destination you selected during installation. You will then be able to drag the application into your toolbar for easier access.

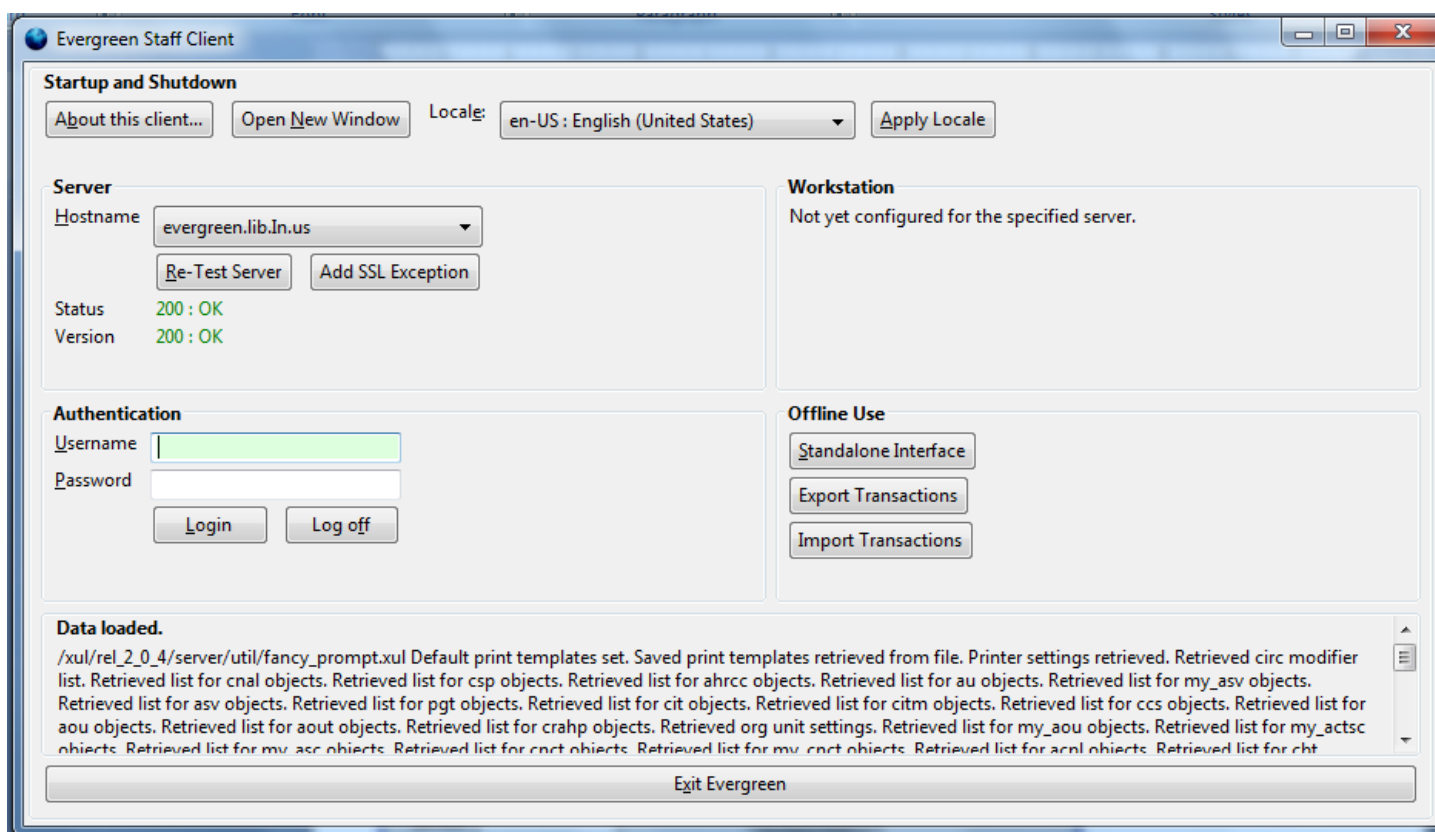


Evergreen Indiana libraries should use **evergreen.lib.in.us** for the hostname.



## Workstation Names

The Evergreen staff client must be assigned to a library and given a unique name before it will connect fully to the Evergreen server. The only restriction is that the workstation's name must be unique within the assigned library. Make sure to select a workstation name that you will remember later, and reflects the role, purpose, and/or location of a particular computer. These names will come up later in statistical reporting, and can also be handy when troubleshooting.



In order to assign a workstation a name, a user with appropriate permissions must login to the staff client (**LocalAdmin**). In Evergreen Indiana, the local system administrator has the ability to assign workstation names in his or her library system. Library managers have the ability within their branch. To assign a workstation a name, login to the system. You will be prompted to assign the workstation a library and a name:

The screenshot shows the Evergreen Staff Client window. The 'Workstation' section is highlighted with a red box. It contains the following fields and buttons:

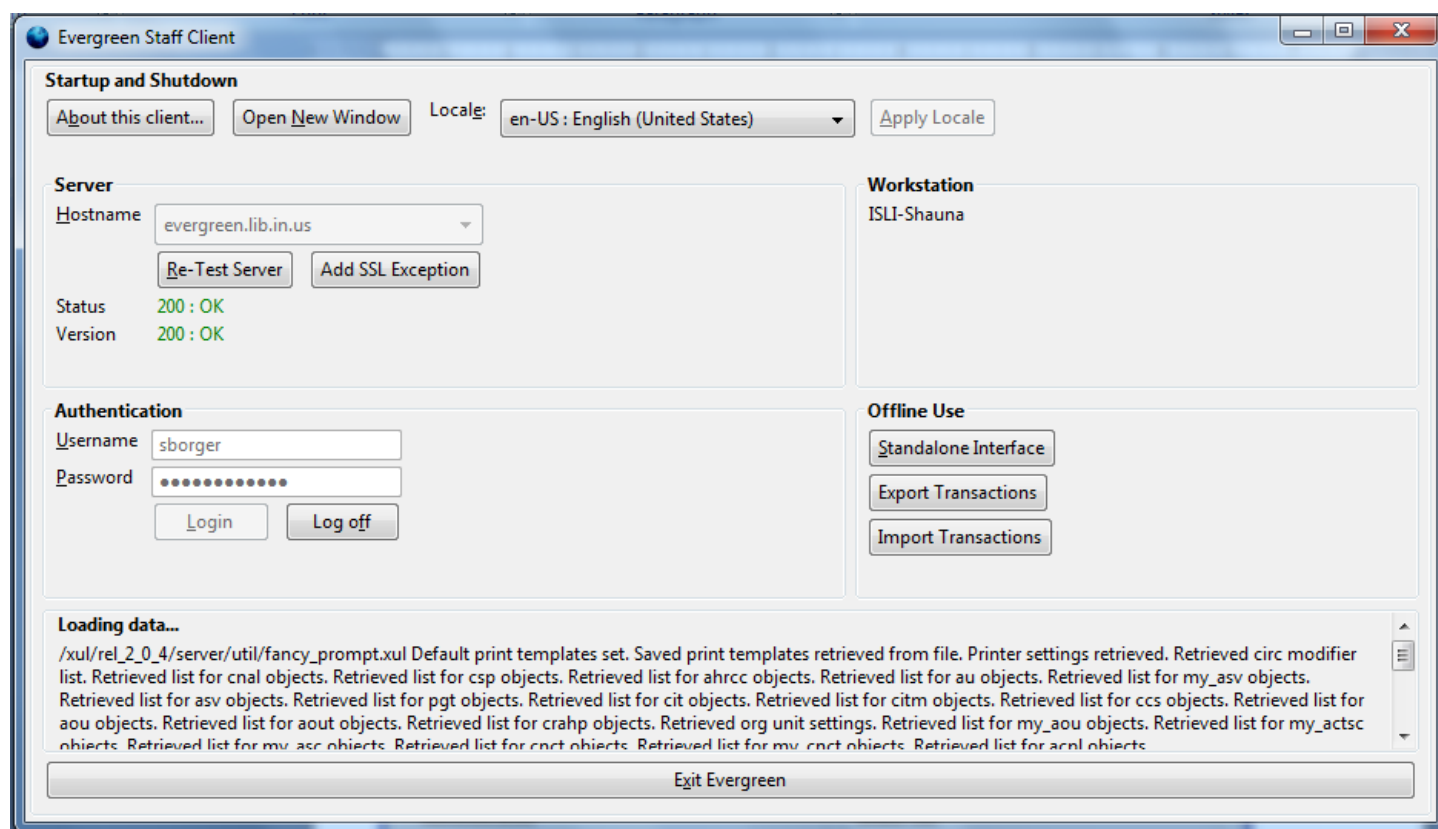
- WS Name:** A text input field containing 'isli-frontdeskCirc'.
- Organization:** A dropdown menu showing 'ISLI'.
- Buttons:** 'Register' and 'Help'.

Other sections visible in the window include:

- Startup and Shutdown:** 'About this client...', 'Open New Window', 'Locale: en-US : English (United States)', 'Apply Locale'.
- Server:** 'Hostname: evergreen.lib.in.us', 'Re-Test Server', 'Add SSL Exception', 'Status: 200 : OK', 'Version: 200 : OK'.
- Authentication:** 'Username: sborger', 'Password: [masked]', 'Login', 'Log off'.
- Offline Use:** 'Standalone Interface', 'Export Transactions', 'Import Transactions'.
- Data loaded:** A scrollable text area showing various data retrieval messages.
- Exit Evergreen:** A button at the bottom.

Select the library branch this workstation physically operates in from the drop down menu. In this example, I have selected ISLI. Next, type in a memorable name for the current workstation. Although the name is arbitrary, it is used to identify some transactions which have been conducted on the specific workstation so it is helpful if the workstation name indicates the main activity for which it is used. In the example above, the branch is listed (isli) and then frontdeskCirc is added to indicate that the workstation activity is predominantly circulation. Then hit **Register**.

Once you have registered your workstation with the server, your screen will look like this:



At this point, you are ready to login to the Evergreen staff client for the first time! Re-type in your password, and hit **Login**.